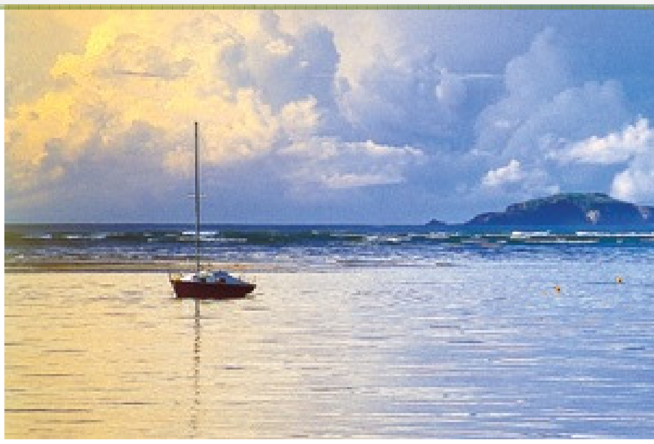
Fin Year 2017/8

Eurobodalla Tourism Monitor



DESTINATION RESEARCH
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November 2018

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The report has been compiled by researchers from Destination Research. The visitation statistics contained this report are based on the sample data collected by Tourism Research Australia (IVS and NVS) and therefore provide an indication of visitor trends rather than actual performance measures. The information presented in this report is accurate at the time of printing. Whilst all care is taken to ensure its accuracy, no liability is accepted for loss or damage as a result of its content. Findings and recommendations are based on the data of the current study; further research may be required in some areas to validate the findings of this study.

Enquiries should be directed to the Research Manager, destination.research@yahoo.com

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Introduction

The purpose of this report is to provide analysis of visitor data provided by Tourism Research Australia (TRA) regarding domestic and international visitors. The report provides analysis of data provided by TRA that is relevant to the Eurobodalla destination, and organising it into simplified reports. The data to be analysed includes the following 10 variables across domestic and international data:

1. Visitor numbers
2. Visitor nights and average length of stay
3. Purpose of trip
4. Age groups
5. Source markets
6. Key activities
7. Accommodation – B & B, hotel, camping
8. Lifecycle groups - families, couples, singles
9. Transport and/or place of arrival
10. Travel party type (package, backpackers).

TRA conducts statistically reliable surveys of domestic travellers over the phone asking for details of travel undertaken throughout Australia, and asking for the destination and activities of travellers. This provides a pattern of where visitors are travelling and how much that travel is worth to the economy. The data is reported quarterly, however it is not released to the industry until a few months later. In a separate survey, international travellers are surveyed at airports and cruise terminals to discover their visitation patterns while they are in Australia.

However, the TRA data has known issues particularly when analysing smaller segments of visitors coming to regional areas - where the sample size is small the results can be unreliable. For example the numbers of international heritage tourists in Eurobodalla is a tiny percentage of all international tourists to Australia, and is therefore hard to accurately capture in a large survey. In these cases the research is therefore considered an indication of visitor trends rather than actual performance measures.

Despite the slight variations in smaller segments of data the TRA data is the most reliable source of visitor data available, showing historical data over the past 10 years. The best indicator of the reliability of TRA data is the consistency of the results over time. As shown in this report, the ratios of tourists, their activities and accommodation etc remains fairly constant over both five and ten year timeframes. It is important however to seek further research into specific market segments before basing planning, development or investment decisions on TRA data alone.

Methodology

Data is downloaded from TRA National Visitor Survey and International Visitor Survey and reanalysed by staff at Destination Research. Where possible this is cross-checked with published statistics, and data compiled by DNSW, TRA and other tourism organisations.

I. The analysis utilises TRA subscription data, with most analysis using a five year average.

II. All analysis in this report is undertaken using a financial year (2016/7) however where needed a ten year time series is also shown to examine trends over time. Other analysis by the TRA is undertaken using year-end in September, December and March, providing slightly different reporting of "yearly" results.

III. TRA data is analysed in statistical areas (SA2) which when combined make up the total LGA of Eurobodalla the report is based on:

   a. 101041017 - Batemans Bay
   b. 101041018 - Batemans Bay - South
   c. 101041021 - Broulee - Tomakin
   d. 101041022 - Deua - Wadbilliga
   e. 101041024 - Eurobodalla Hinterland
   f. 101041024 - Moruya - Tuross Head
   g. 101041027 - Narooma (this SA2 also includes Bermagui).

IV. Sample sizes for each data set are shown in this report and it is acknowledged that the data derived from TRA surveys and subject to sample error. The likelihood of sample error is explained by TRA and should be read before drawing any conclusions or inferences, or taking any action, based on the data. Further information on the methodology used by TRA and the extent of sample error can be sourced at http://www.tra.gov.au/aboutus/international-visitor-survey-methodology.html

V. Visitor expenditure data for individual local government areas (LGA), or statistical areas (SA2) **is not** provided regularly by the TRA and is only provided in a summarised form for regions (i.e. for the South Coast region, but not for Eurobodalla).TRA may provide a one-off analysis for an LGA as shown in this report.

VI. In January 2014 TRA adopted a modified methodology to collect data from domestic visitors which includes accessing Australian residents using mobile phones as well as home phones. In late 2015, TRA implemented an improved phone number data set that better represented the mobile-user population. However, this caused unexpected growth rates for some smaller population areas and for business travel. TRA has revised the estimates for 2014 and 2015 data to ensure the continuation of the time series, and the revised estimates are in the release of year ending March 2017 data. The revised data HAS BEEN included in this report.

EUROBODALLA VISITOR PROFILE (2017/8)

The following is a brief profile of visitors to Eurobodalla for the financial year 2017/8. Further analysis of the key markets are found in the sections following.

- *Domestic overnight* markets provided an estimated **818,237** visitors for 2.8 million nights.
- *Domestic day trips* provided an estimated **532,000** visitors per year.
- *International markets* provided an estimated **37,798** visitors per year for 151,176 nights.
- The three markets totalled **1.4 million** visitors to Eurobodalla.

Domestic overnight visitors

- Key markets Canberra (32%), Sydney (26%), the South Coast (10%).
- Lifecycle segments include families (31%) and older retired persons (21%).
- Key activities include social activities (39%) and outdoor nature activities (28%).

Domestic day visitors

- Key markets are South Coast (60%), Canberra (27%), Capital Country (7%)
- Lifecycle segments include older retired couples (44%) and families (23%).
- Key activities include social activities (52%) and outdoor/nature activities (23%).

International visitors

- International visitors are mainly from UK (17%), Germany (15%) and USA (10%).
- Key activities include social activities (22%) and outdoor/nature activities (21%).
- Backpackers make up 19% of the international market.
- Package tours 7%.

TABLE 1: VISITOR SUMMARY: 2017/8

Five Year Average	Domestic overnight	International	Domestic day trip	Total
Visitors ('000)	818,237	37,798	532,000	**1,388,000**
Nights ('000)	2,811,594	151,176	^	**2,821,100**
Av night stay	3.4	4.0	^	
Lifecycle	Families with children (31%) Older retired persons (21%)	Older people 55+ (39%) Young people, 20-30yrs (27%)	Families with children (23%) Older retired couples (34%)	
Activities	1. Social (dining, VFR) 2. Outdoor/nature 3. Active sports	1. Social (dining, sights) 2. Outdoor/nature 3. Local attractions	1. Social (dining, VFR) 2. Outdoor/nature	
Source markets	Canberra (32%) Sydney (26%) South Coast (10%)	UK/Europe (56%) Nth America (17%) Asia(16%)	South Coast (60%) Canberra (27%) Capital Country (7%)	

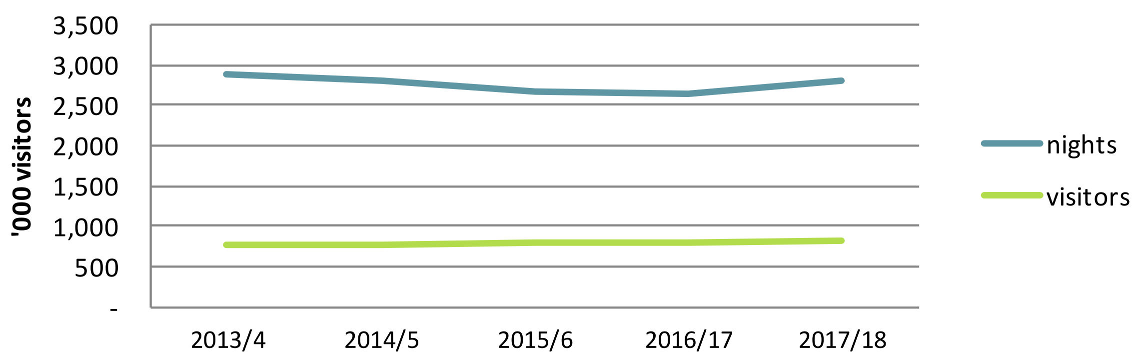
Domestic Overnight Visitors

The past financial year has seen a rise in the numbers of domestic overnight visitors of 3% to 818,000 visitors, making this the largest visitor segment. Visitors spent an estimated 2.8 million nights in the LGA at an average of 3.4 nights.

Table 2: Domestic Overnight visitors

Domestic Overnight	2013/14	2014/15	2015/16	2016/17	**2017/18**	5 yr average[1]
# of visitors	778	764	785	793	**818**	718
% increase on yr	*10.4%*	*-1.9%*	*2.8%*	1.0%	**3.2%**	3%
Nights	2,875	2,950	2,719	2,630	**2,812**	2,755
Av night	3.7	3.9	3.5	3.3	**3.4**	3.7
Sample	*335*	*359*	*337*	333	**355**	332
Spend per trip						$432[2]
Spend per night						$172
Lifecycle	Families (31%), Older retired persons (21%)					
Activities*	1. Social activities, 2. Outdoor nature, 3. Active sports					
Source*	56% NSW, 31% ACT and 12% OTHER INTERSTATE. 1. Canberra (32%) 2. Sydney (26%) 3. South Coast (10%)					

Figure 1: Domestic Overnight: Visitors and Nights 2013/4 to 2017/8



Visitor Expenditure (DON)

Visitor expenditure for individual LGAs is produced every two years by TRA, showing the average for domestic overnight travellers to Eurobodalla LGA is $432 per trip[2] ($128 per night excluding accommodation and $172 including accommodation). These figures are the same as the average for the South Coast region[3] of $147 per night .

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[1] Previous 5 year average 2013/14 to 2017/8.

[2] TRA (2017) LGA report for Eurobodalla – expenditure is based on a 4 year average

[3] http://www.destinationnsw.com.au -South-Coast-YE-Mar-18.pdf

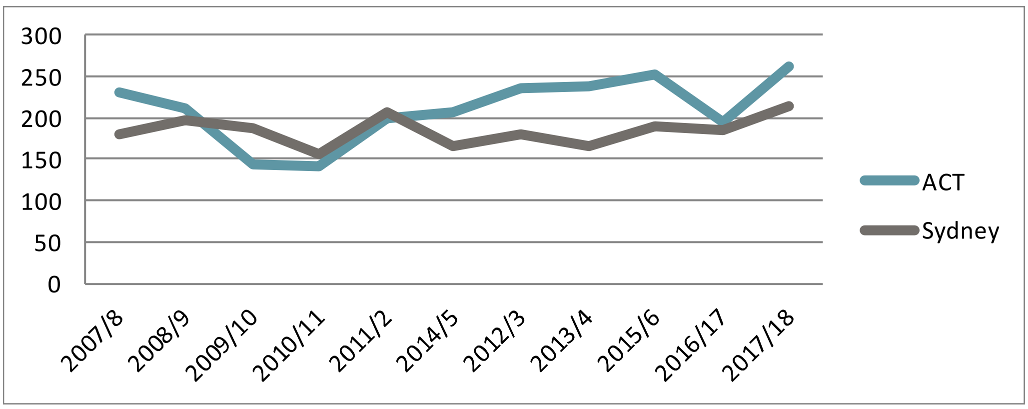
Visitor Residence (DON)

TABLE 3: VISITOR RESIDENCE: 2017/8

		% AUST 5 Yr average	% AUST 2017/8
NSW (56%)	Sydney	24.1%	26.0%
	South Coast	10.6%	10.4%
	Capital Country	8.5%	6.7%
	Central NSW	2.7%	5.3%
	Riverina	1.9%	1.7%
	Blue Mountains	1.3%	0.1%
	North Coast NSW	1.4%	0.9%
	Snowy Mountains	1.1%	1.1%
	Central Coast	1.2%	1.3%
	Hunter	1.1%	1.7%
	The Murray	0.5%	0.4%
	Outback NSW	0.3%	0.0%
	New England	0.2%	0.0%
ACT		29.3%	31.9%
VIC		9.8%	10.2%
QLD		1.8%	0.9%
SA		0.7%	0.1%
WA		0.6%	0.4%
TAS		0.5%	0.8%
NT		0.1%	0.1%

The vast majority of domestic overnight visitors come from within NSW, with just under half of those come from Sydney (24%). Nearby regions such as the South Coast (10%) and the Capital Country (8.5%) also provide good visitation. Visitors from Canberra/ACT increased this year to nearly one third (32%). As shown in Figure 3 below, visitation from Canberra has overtaken Sydney in the past 7 years while together they make over half of the domestic overnight market.

FIGURE 3: DOMESTIC OVERNIGHT VISITORS FROM CANBERRA AND SYDNEY



Reason for Visit (DON)

Visiting Eurobodalla for the purpose of a holiday was the primary reason to visit, with 72% of visits for this reason. Visiting friends or relatives makes up 22% of domestic overnight visits in 2017/8, slightly less than previous years.

TABLE 4: DOMESTIC REASON FOR VISIT

	2013/4	2014/5	2015/6	2016/17	2017/18	current %	5 yr av	+/_
Holiday	482.2	520.6	543.0	494.9	593.0	72.5%	66.9%	5.6%
VFR	214.7	170.3	170.4	201.6	179.0	21.9%	23.8%	-1.9%
Business	62.8	53.1	39.6	61.0	25.0	3.1%	6.1%	-3.1%
Other	11.4	16.5	24.2	17.8	13.0	1.6%	2.1%	-0.5%
In transit	8.5	3.1	7.2	18.8	8.0	1.0%	1.2%	-0.2%
Total	778.2	763.5	785.1	794.1	818.0	100.0%	100.0%	

Accommodation (DON)

The importance of the VFR market is also highlighted with VFR being the highest type of accommodation used (30%). Non-commercial accommodation accounts for 50% of visitors and includes weekenders (8%), friends and relatives homes (30%) and other private dwellings such as AirBNB (3%). Commercial accommodation (shaded section in Table 5) accounts for 50% of accommodation used by domestic overnight visitors, including hotels and resorts (16%), commercial caravan parks (20%) and rented houses and apartments (13%).

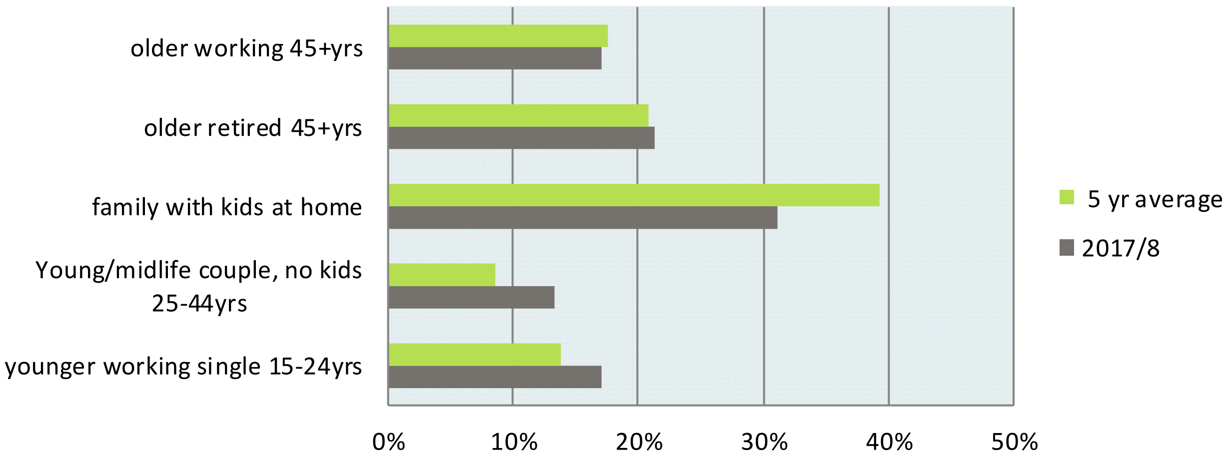
TABLE 5: ACCOMMODATION OF DOMESTIC OVERNIGHT VISITORS

	2013/4	2014/5	2015/6	2016/17	2017/18	% of 2017/18	5 yr av
Guest house or Bed & Breakfast	9	9	12	1	16	2%	1%
Rented house/apt/flat	48	79	98	90	109	13%	11%
Caravan park or commercial camping	173	175	170	183	157	19%	21%
Hotels/resorts	169	147	144	154	130	16%	19%
Non commercial camp	57	43	32	36	73	9%	6%
Own property	87	51	106	74	69	8%	10%
Private accomm (VFR)	234	266	223	245	243	30%	30%
Other private (incl AirBNB)	13	25	21	8	21	3%	2%
Totals	790	795	806	791	818	100%	100%

Lifecycle/travel party (DON)

Analysis of this year's lifecycle segments suggests families with kids at home (1 – 18 years) are not as strong as they have been for the past 5 years* (31% compared to 38%), while older working and retired visitors remain around the same (38%). As shown below there is a slight increase from younger singles and couples (both up around 3%).

FIGURE 4: DOMESTIC OVERNIGHT: LIFECYCLE (2017/8)



* data not collected by TRA in 2012/3 and 2013/4

Analysis of the **travel party** showed similar results with 21% travelling in a family group with children, and a further 8% as friends or relatives travelling together with children.

Age (DON)

These lifestyle groups coincide with the prominent age groups as shown in the chart below with over a third of visitors (38%) over 55 years old, and 35% between 30 and 50 years of age.

TABLE 6: AGE GROUPS OF DOMESTIC OVERNIGHT VISITORS

	2013/4	2014/5	2015/6	2016/17	2017/8	5 YR AV
15-19 yrs	2.9%	3.7%	6.1%	5.5%	5.2%	4.7%
20-24 yrs	6.1%	3.6%	7.3%	7.7%	9.5%	6.8%
25-29 yrs	4.7%	9.3%	6.2%	7.1%	5.9%	6.6%
30-34 yrs	11.4%	5.3%	6.9%	9.1%	12.3%	9.0%
35-39 yrs	5.3%	7.8%	9.2%	7.7%	7.7%	7.5%
40-44 yrs	10.6%	9.4%	15.7%	11.9%	6.9%	10.9%
45-49 yrs	8.2%	8.9%	7.2%	7.4%	8.2%	8.0%
50-54 yrs	11.3%	13.3%	6.8%	7.2%	6.8%	9.1%
55+ yrs	39.6%	38.7%	34.5%	36.5%	37.6%	37.4%
	100%	100%	100%	100%	100%	100%

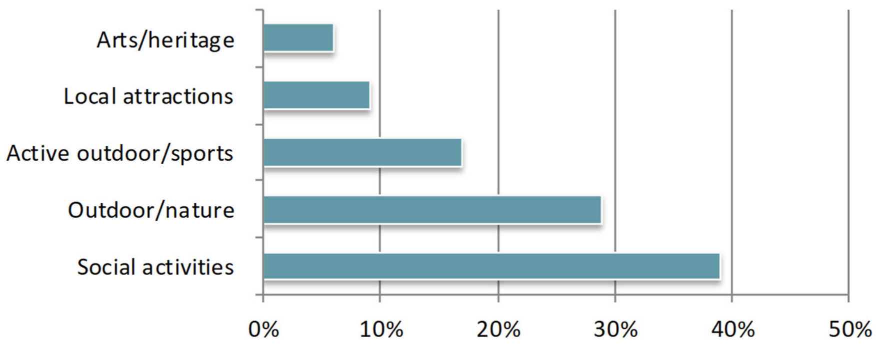
Transport (DON)

The most popular transport option is for self drive 98% with 2% choosing bus/coach/aircraft.

Activities (DON)

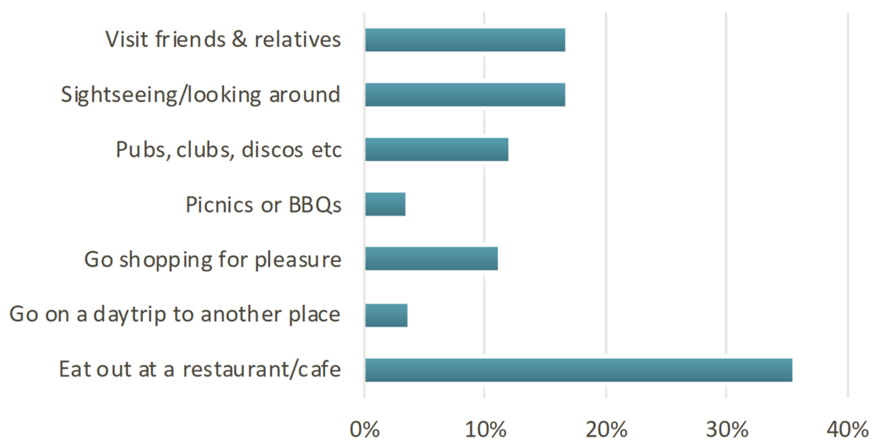
Social activities and outdoor/ nature activities continue to be the main activities undertaken in Eurobodalla. Both for those on a dedicated trip to the area and for those on a stopover, these two activities make-up the majority of tourist activity with "social activities" accounting for about 39% of all survey responses and 28% relating to "outdoor/nature activity".

FIGURE 6: DOMESTIC OVERNIGHT ACTIVITIES



Survey respondents could choose more than one response, so it is possible that these activities were both undertaken in the same trip. Further analysis of "social activities" below suggests that eating out (36% of total activities) and visiting friends/relatives (17%), sightseeing (17%) and shopping (11%) are the key activities in this segment.

FIGURE 7: OVERNIGHT: SOCIAL ACTIVITIES



DOMESTIC DAY VISITORS

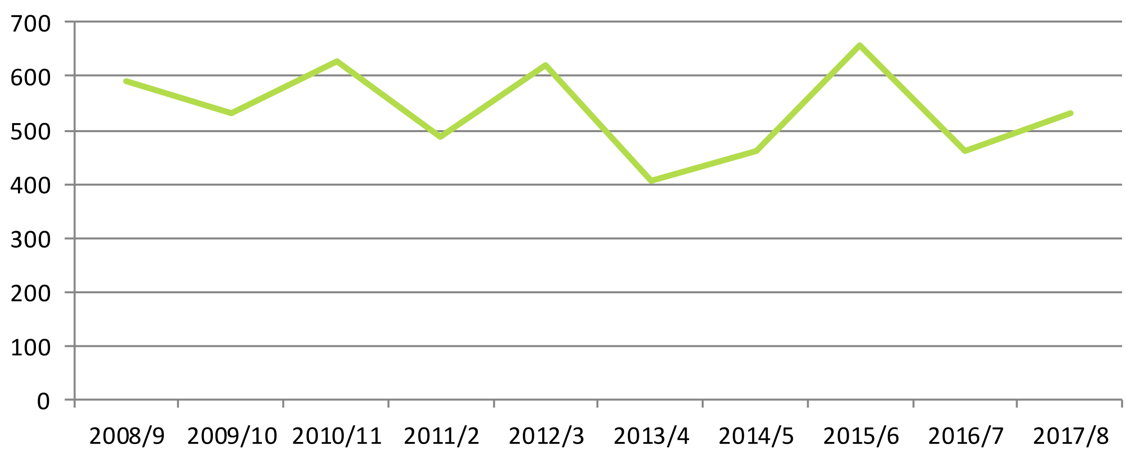
The numbers of domestic day visitors has increased in the past financial year, recovering from the previous year's dip. However it should be noted that day visitation is often quite variable where factors such as weather and other events can deter or encourage day visits, as shown below.

TABLE 7: DOMESTIC DAY VISITORS: SUMMARY

Domestic Day Visitors '000	2013/4	2014/5	2015/6	**2016/17**	**2017/18**	**5 yr average**
# of visitors	407	461	656	461	532	503
% increase/decrease	*-34%*	*13%*	*42%*	*-30%*	15%	
Spend per trip						$101
Sample size	*60*	*58*	*73*	*56*	79	
Lifecycle	Families, with children 23% Older retired couples 34%,					
Main activities	1. Social, 2. Outdoor/nature, 3. Active sports					
Source markets	1. South Coast (60%), 2. Canberra (27%) 3. Capital country 7%					

In the 5 years previous to 2017/8 there was an average of 503,050 domestic day visitors per year, however, as shown in Figure 7, the results over the last ten years shows the volatility of this market. This is typical of day visitation, which is often affected by weather events and other impacts. However, it should also be noted that the sample size for this segment is quite limited, which could also account for the annual increases and decreases, which can be expected to be up to 11.5%[4].

FIGURE 7: DOMESTIC DAY VISITORS: 2008/9 – 2017/8



[4] approx. 11.5% at the 95% confidence level.

Visitor Expenditure (DDV)

Visitor expenditure for individual LGAs is produced every two years by TRA, showing the average for domestic day visitors to Eurobodalla spend an average of $101 per trip[5]. This is equal to the average for the South Coast region ($101 per trip) and NSW ($104 per trip 2017[6]).

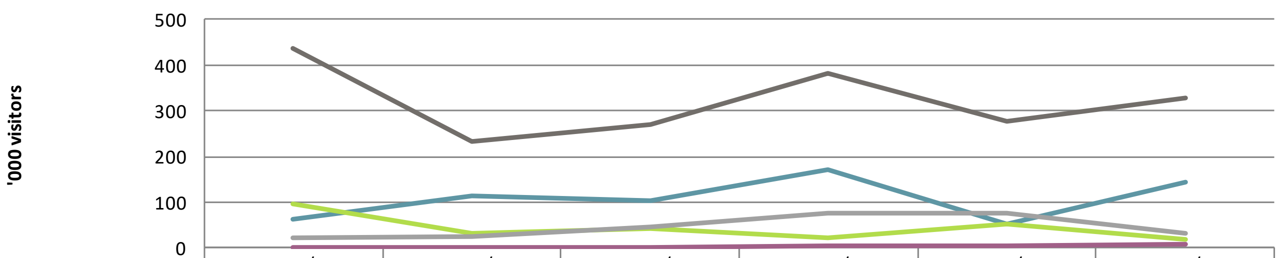
Visitor Residence (DDV)

The vast majority of domestic day visitors come from within the South Coast region comprising 60% of day visitors in the current year. A significant number of day visitors also come from Canberra and other parts of the Capital Country (34% total), and 11% from Sydney.

TABLE 8: DOMESTIC DAY VISITORS: RESIDENCE

		5 yr av	2017/8
NSW (73%)	Sydney	13%	11%
	South Coast	74%	60%
	Capital Country	13%	7%
	Other NSW	-	-
ACT (27%)		23%	27%
VIC (<1%)		-	-
		100%	100%

FIGURE 8: DOMESTIC DAY VISITORS: TOP DOMESTIC DAY MARKETS



	2012/3	2013/4	2014/5	2015/6	2016/17	2017/18
ACT	62	114	104	172	52	144
South Coast	437	234	270	383	278	329
Sydney	98	32	42	21	51	18
Capital Country	23	24	45	76	77	33
All other regions	0	0	0	4	3	8

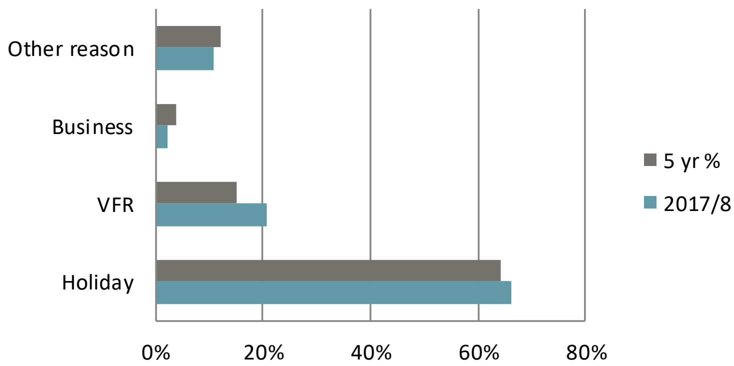
[5] TRA (2017) LGA report for Eurobodalla – expenditure is based on a 4 year average

[6] http://www.destinationnsw.com.au -South-Coast-sub-region-YE-Jun-17.pdf

https://www.destinationnsw.com.au - Total-NSW-snapshot-YE-Jun-17.pdf

Reason for Visit (DDV)

Figure 9: Domestic Day Visitors: Reason



Day visitors were primarily **on holiday (66%)**, while others are visiting friends or relatives (21%), on business (2%) or in the area for "other reasons" (11%) - including medical reasons (6%). As shown in Figure 9 reasons to visit are very consistent with past trends over the past 5 years, with holiday visitors dropping slightly.

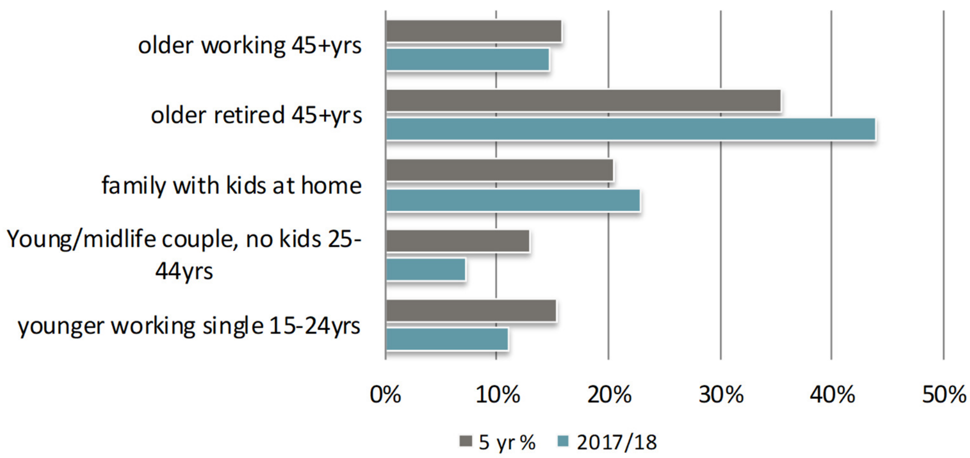
Transport (DDV)

The most popular transport option is for self-drive (99%) with 1% choosing the bus/coach.

Lifecycle (DDV)

There are two clear groups which remain as prominent lifecycle segments for day visitors. Older retired people (single or married aged 45+ yrs) are the largest group, and increasing on **previous years at 44%.** Families with children of any age are the second main group at **23%** of all lifecycle groups.

Figure 10: Domestic Day Visitors: Lifecycle 2017/8



Age and marital status (DDV)

As suggested in the lifestyle groups above, there was a larger proportion of visitors age groups 55+ (61%) and less in the 20-30 years (6%).

The ratio of those who are part of a couple (76%) is higher than those who are single (24%).

Males (56%) are more prominent than females (44%).

TABLE 9: AGE GROUPS OF DAY VISITORS

	2013/4	2014/5	2015/6	2016/7	2017/8	5 YR AV
15-19 yrs	3%	6%	12%	6%	5%	6%
20-24 yrs	0%	3%	2%	8%	3%	3%
25-29 yrs	7%	12%	11%	10%	3%	8%
30-34 yrs	11%	2%	7%	1%	2%	4%
35-39 yrs	2%	7%	1%	1%	4%	3%
40-44 yrs	9%	7%	11%	13%	11%	11%
45-49 yrs	7%	6%	4%	2%	8%	6%
50-54 yrs	11%	12%	12%	8%	4%	9%
55+ yrs	49%	44%	39%	52%	61%	49%
	100%	100%	100%	100%	100%	100%

Main destination (DDV)

Using the SA2 categories, the main destination for day visitors and overnight visitors is Batemans Bay[7] with 62% of day visitors and 46% of overnight visitors. The second highest visitation is in Narooma[8] which receives 18% of day visitors and 24% of domestic overnight visitors.

TABLE 10: MAIN DESTINATION IN EUROBODALLA

	2013/4	2014/5	2015/6	2016/7	2017/8	5 yr average	2017/18 day trip av %*	2017/18 overnight av %
Batemans Bay	219	262	447	306	328	312	62%	46%
Broulee - Tomakin	10	18	12	24	12	16	3%	7%
Eurobodalla Hint	44	29	20	15	11	23	4%	11%
Moruya - Tuross Head	28	44	92	75	63	59	12%	13%
Narooma	34	106	128	41	117	91	18%	24%
Total	366	470	706	461	531	518	100%	100%

** see notes on small sample size for day visits pg 14*

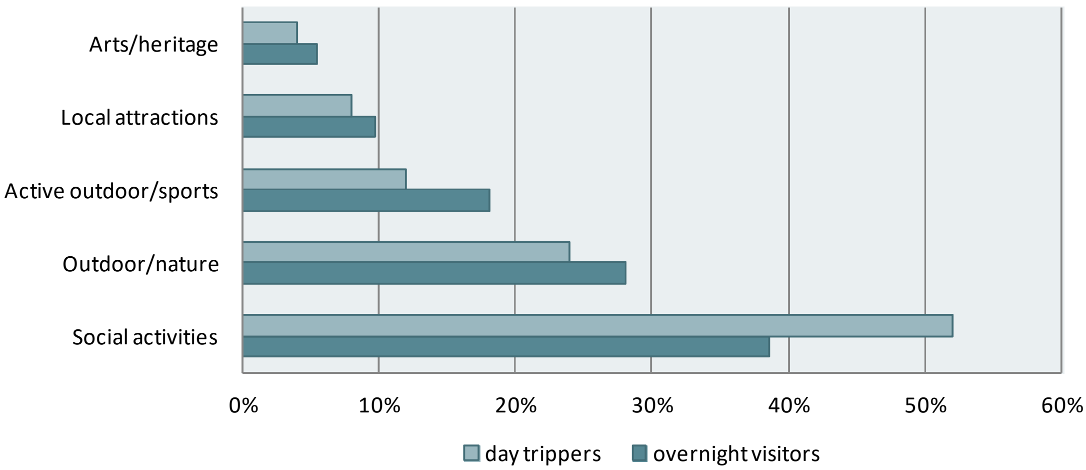
[7] includes Batemans Bay South

[8] SA2 for Narooma includes Bermagui

Activities (DDV)

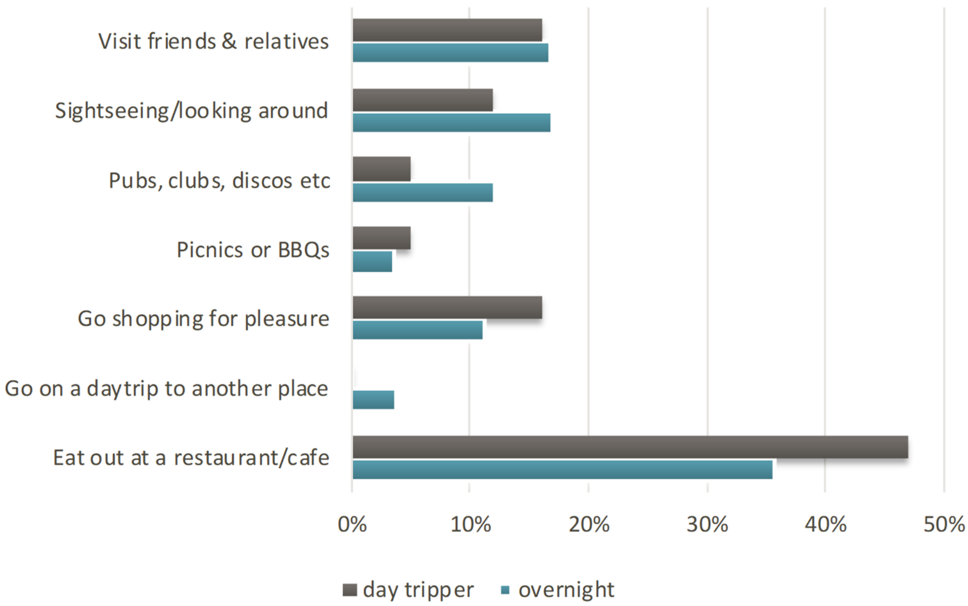
For both overnight and day visitors, the pattern of activities remains similar. Social and outdoor/nature activities are the two major activities undertaken in Eurobodalla. However as shown, day trippers undertake more social activities (52%) than overnight visitors (39%).

FIGURE 11: DOMESTIC DAY VISITORS: ACTIVITIES



Further analysis shows the breakdown of social activities is also similar to overnight visitors with a higher proportion of visitors eating out (47% of social visitors), as well as shopping (16%). A smaller proportion are visiting friends/relatives (16%).

FIGURE 12: DOMESTIC DAY VISITORS: SOCIAL ACTIVITIES



INTERNATIONAL VISITORS

The number of international travellers has increased in the past three years to approximately 38,000.

TABLE 11: INTERNATIONAL VISITORS: SUMMARY

INTERNATIONAL '000	2013/4	2014/5	2015/6	2016/7	2017/8	5 yr average
# of visitors	26	25	29	37	38	25
% change on year	23%	-3%	17%	25%	3%	5.9%
Nights	101	144	91	191	151	113
Av night stay	3.9	5.8	3.1	5.2	4.0	4.5
Sample size	*165*	*173*	*184*	*190*	*183*	
Spend per trip	^	^	^			$386
Spend per night						$78
Activities	1. Social, 2. Outdoor/nature, 3. local attractions					
Source	All Europe incl UK (56%) Nth America (17%) All Asia (16%) UK (17%) Germany (15%) USA(10%)					

Visitor Residence (INT)

The Eurobodalla continues to attract a very consistent mix of international markets, with the main generating countries being the UK (24% of visitors) and Germany (18%). Table 12 shows the wide variety of geographical markets which comprise the total international market.

TABLE 12: INTERNATIONAL MARKETS

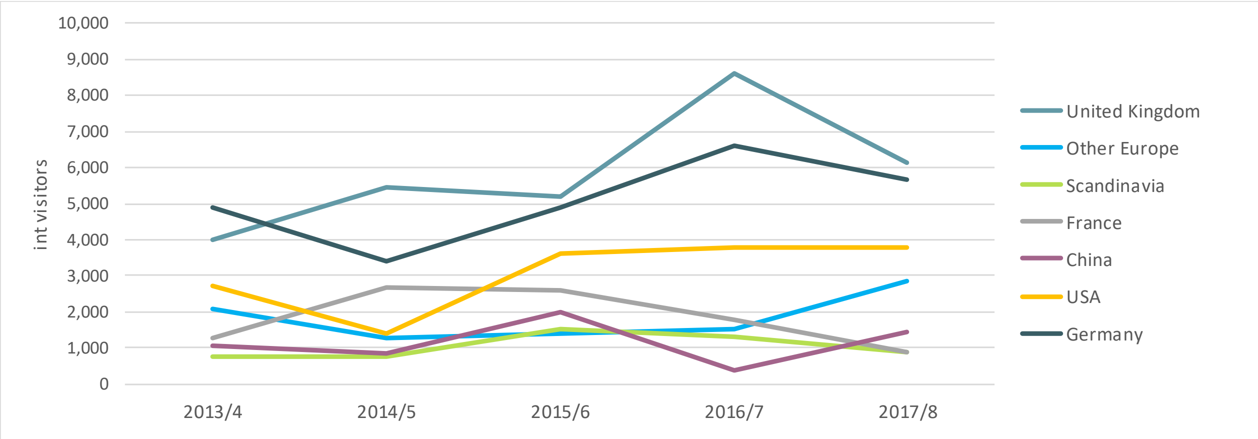
	2013/4	2014/5	2015/6	2016/7	2017/8	AVERAGE
UK	15%	22%	18%	23%	17%	19%
Germany*	19%	14%	17%	18%	15%	17%
USA	10%	6%	12%	10%	10%	10%
Other Europe*	8%	5%	5%	4%	8%	6%
Canada	6%	8%	7%	6%	7%	7%
Other Asia	0%	0%	1%	2%	6%	1%
China	4%	3%	7%	1%	4%	4%
New Zealand	12%	4%	5%	7%	4%	7%
Other	4%	5%	3%	2%	4%	5%
France*	5%	11%	9%	5%	2%	6%
Scandinavia*	3%	3%	5%	4%	2%	3%
Switzerland*	6%	5%	2%	2%	2%	1%
Italy*	0%	1%	0%	2%	1%	1%
Japan	0%	0%	0%	1%	1%	0%
Korea	0%	0%	1%	1%	0%	1%
Malaysia	0%	0%	0%	4%	0%	1%
Netherlands*	2%	4%	3%	4%	0%	3%

When grouped further into international regions;

- countries in **Europe & UK** (marked with *) are the highest generating region (56%)
- countries in **North America** combine to 17%
- countries in **Asia** equal 16%
- New Zealand 6%
- all other countries 4%.

Over the past 5 years key international markets such as the UK and Germany continue to grow and provide the bulk of international visitation. In particular Germany, USA and the UK show positive gains . Other Asian markets have increased slightly, including China, however they remain as smaller segments.

FIGURE 13: KEY INTERNATIONAL MARKETS



Visitor Expenditure (INT)

Visitor expenditure for individual LGAs was produced in 2017 showing the four year average for international visitors to Eurobodalla. It suggest they spend an average of $78 per night[9] and $386 per trip. This is slightly lower than the South Coast region 2016/7 ($99 per night[10]).

Transport (INT)

Clearly the most popular transport option is for international markets is self drive (92%), with 9% choosing the bus/coach and 2% aircraft.

[9] TRA (2016) LGA report for Eurobodalla

[10] http://www.destinationnsw.com.au -South-Coast-region-YE-Jun-17.pdf

Age (INT)

International visitors are in older age groups 55+ (39%) as well as young travellers 20-30yrs (26%). These age groups have remained very consistent over the past 5 years.

TABLE 13: AGE GROUPS OF INTERNATIONAL VISITORS

	2013/4	2014/5	2015/6	2016/7	2017/8	5 YR AV	+/-
15-19 yrs	4%	4%	3%	3%	3%	3%	-
20-24 yrs	14%	10%	12%	15%	12%	13%	-1%
25-29 yrs	9%	14%	18%	12%	14%	13%	1%
30-34 yrs	5%	12%	6%	5%	7%	7%	0%
35-39 yrs	4%	4%	9%	4%	7%	6%	1%
40-44 yrs	3%	7%	4%	5%	4%	5%	-1%-
45-49 yrs	13%	4%	6%	11%	9%	9%	0%
50-54 yrs	6%	7%	7%	6%	6%	6%	0%
55+ yrs	45%	37%	37%	39%	39%	39%	0%
	100%	100%	100%	100%	100%	100%	

Lifecycle and parents

The lifecycle group of international visitors is changing to be similar to the domestic traveller. Over the previous past 5 years (2013-18), families with a parent of children under 15 yrs have represented only 14**%** of visitors, compared to 19% of domestic day visitors and 37% domestic overnight.

TABLE 14: PARENTS OF CHILDREN UNDER 15

PARENTS OF CHILDREN	2011/2	2012/3	2013/4	2014/5	2015/6	2016/7	2017/8	5 YR AVERAGE
International	6%	14%	6%	2%	11%	16%	17%	10%
Domestic Day	35%	22%	^	13%	19%	23%	23%	20%
Domestic Overnight	44%	^	^	40%	33%	30%	31%	34%

^ data not collected by TRA in that year

Travel Party (INT)

Both singles (42%) and couples (35%) are the major international travel groups, with families making 8% of the total. Other features of the travel parties;

- males comprise 47% and females **53%**
- 19% of international visitors are **backpackers**
- a decreasing number are on package tours 7% (down from 11% in 2011/2)
- most are independent travellers (99% are **not** on a group tour).

TABLE 15: TRAVEL PARTY FOR INTERNATIONAL VISITORS

	2013/4	2014/5	2015/6	**2016/7**	**2017/8**	**% of total 2017/8**	5 yr average
Single traveller	11,891	10,534	12,306	14,662	15,465	42.3%	42.4%
Adult couple	9,063	11,649	11,575	12,833	12,593	34.4%	37.7%
Family group	1,743	711	2,822	4,051	2,767	7.6%	7.9%
Friends/relatives travelling	3,246	2,122	2,696	4,653	5,738	15.7%	12.1%
Total	25,944	25,017	29,400	36,600	36,663	100.0%	100%

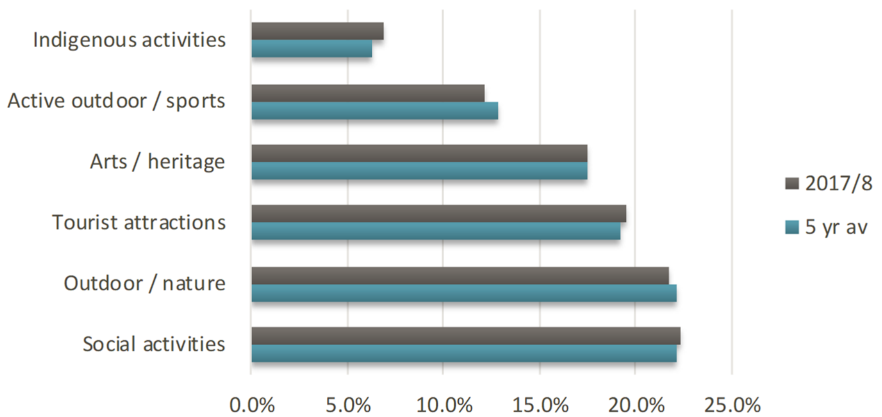
Reason for Visit (INT)

Results for the reason to visit were not collected by TRA for 2017/18. Over the past 5 years (2012/3 to 2016/7) there has been a clear pattern that most overnight visitors **on a holiday (85%)**, while others are visiting friends or relatives (12%), and a smaller ratio are here on business (2%) or other reasons including education (1%) or being in transit (1%).

Activities (INT)

Activities on the trip stay very consistent with social activities (22%) and outdoor/nature activities (21%) being the two major activities undertaken by International visitors in Eurobodalla, along with local tourists attractions (19%).

FIGURE 14: INTERNATIONAL ACTIVITIES



Place of arrival (INT)

The majority of international visitors arrived at Sydney airport (55%) with the other 45% arriving in a variety of places in Australia, including Melbourne (27%) and for now in Canberra (0.04%).

TABLE 16: PLACE OF ARRIVAL FOR INTERNATIONAL VISITORS

	2013/4	2014/5	2015/6	2016/7	2017/8	5 yr average	% of total
Sydney	14.4	14.4	17.0	18.9	19.8	16.9	55%
Melbourne	6.4	6.3	8.5	10.5	10.4	8.4	27%
Brisbane	1.4	1.8	1.6	2.3	2.6	2.0	6%
Perth	1.6	1.1	0.8	2.8	0.5	1.4	4%
Adelaide	0.6	1.2	0.1	1.2	1.8	1.0	3%
Darwin	1.1	-	0.5	0.2	0.9	0.5	2%
Cairns	0.1	0.2	0.8	0.1	0.1	0.3	1%
Canberra	-	-	-	0.02	0.2	0.1	0%
Total	25.9	25.0	29.4	36.6	36.6	30.7	100%

Accommodation (INT)

Commercial accommodation (shaded section in Table 17) accounts for 64% of accommodation used, including hotels and resorts (27%) and commercial caravan parks (30%).

Non-commercial accommodation accounts for 36% and includes friends and relatives homes (20%), non-commercial camping (10%).

TABLE 17: ACCOMMODATION FOR INTERNATIONAL TRAVELLERS

	2013/4	2014/5	2015/6	2016/7	2017/8	% of total	5 yr average
Guest house or Bed & Breakfast	1,126	1,368	155	768	2,219	7%	4%
Rented house/apt/flat	1,761	691	1,329	1,166	733	2%	4%
Caravan park or commercial camping ground	7,997	5,469	6,973	12,425	10,035	30%	31%
Backpacker or hostel	1,881	1,820	1,831	1,936	1,204	4%	6%
hotels/resorts	7,392	7,392	9,655	10,300	9,199	27%	32%
non commercial camping	2,575	2,827	3,172	3,198	3,453	10%	11%
private accomm (VFR)	6,333	8,737	9,955	6,912	6,797	20%	22%

2017/8 Comparisons to other regions

Comparisons have been made to the following local government areas which are of similar size and in regional coastal locations.

Table 18: Comparison regions

		2016/17 visitors	2017/8 visitors	2017/8 nights	*% increase on previous year visitors*
Eurobodalla 13% of South Coast	Domestic day	461	532	^	15%
	Domestic overnight	793	818	2,812	3%
	International	37	38	151	5%
	Total	***1291***	***1388***	*2963*	7.6%
Shoalhaven 31% of South Coast	Domestic day	1436	1763	^	22.8%
	Domestic overnight	1532	1544	4789	0.8%
	International	53	64	314	20.8%
	Total	***3021***	***3371***	***5103***	11.6%
Bega 10% of South Coast	Domestic day	347	450	^	29.7%
	Domestic overnight	388	612	2478	-9.1%
	International	39	40	208	2.6%
	Total	***798***	***1102***	***2686***	4.1%
South Coast	Domestic day	5911	6790	^	14.9%
	Domestic overnight	3735	3849	12130	3.1%
	International	174	184	2315	5.7%
	Total	***9785***	***10823***	***14445***	10.2%
Port Stephens	Domestic day	620	820	^	32.3%
	Domestic overnight	655	703	2147	7.5%
	International	38	48	159	26.3%
	Total	***1313***	***1571***	***2306***	19.7%

^ not applicable